

# Buying Cycle Differentiation - Lead Generation and Lead Management [SAMPLE]

Questions to reveal whether ready to move to next stage

Loosening Status Quo to Committing to Change	Committing to Change to Exploring Solutions	Exploring Solutions to Committing to a Solution
Questions revealing whether ready to move from "no change needed" to "change needed"	Questions revealing whether ready to move from "change needed" to "look into any level of solution" (workaround, internal fix, existing vendors, bolt-on fix, new system, new vendor)	Questions revealing whether ready to move from "Look into any level of solution" to "Look into some type of Lead Management Solution / Marketing Automation"

If established that change needed, then triage:

As you plan for 2010, how much of a priority will be placed on lead generation? What other priorities would be more important?



Is Sales responsible for generating most of the new leads, or is your company looking for Marketing to play a bigger role in generating leads?

On a scale of 1 (highest) to 5 (lowest), how important is lead generation for your marketing activities?



Do you have a formal lead generation program?

[If no]: How do you generate leads now?

[If yes]: What does your formal lead generation program entail and which parts are effective and not-so-effective?



What proportion of your lead generation flows from online avenues (your website, SEO, e-newsletters, downloadable white papers, e-books, webinars, email campaigns, etc.?)



Are your Sales people able to focus their time on carrying Sales-accepted leads to a sales finish, or do they spend much of their time prospecting and generating leads?



What percentage of time are Sales people devoting to prospecting?

How well do they prospect?



Do you consider the quantity of leads in your new business pipeline: very poor, could be better, pretty good and always improving, or best-in-class?



Do you consider the quality of leads in your new business pipeline: very poor, could be better, pretty good and always improving, or best-in-class?



Do you consider the speed your organization guides leads through your new business pipeline: very poor, could be better, pretty good and always improving, or best-in-class?



**?** Are you using a marketing automation system (to deliver relevant messages to buyers based on buyer behavior and profiles)?

Yes

[If yes, using marketing automation], are you collecting in a single database a master record of interactions each lead has with your company (visits, views, clicks, attendance, registrations, downloads...)? Does your organization use your database of prospect activity to determine timing, content, and messaging delivered next to each prospect? Would it be important for your marketing touches to be tailored?



[If using marketing automation but not maximizing it]: What are the obstacles to fulfilling your objectives for implementing automation? (don't have: sufficient content, alignment of all who would be involved, staff person to oversee, good integration with our process,...) What would have to happen to improve these weak links? How are you planning to go about strengthening these areas?

No

[If no, not using marketing automation] Has your organization looked into marketing automation?

**?**

Yes

[If yes, are looking or have looked into marketing automation] How long have you been looking into it? What were you trying to accomplish with it? What do you think would be most valuable to you with marketing automation? What has prevented you from implementing marketing automation? What are your biggest concerns about implementing marketing automation (Lack of expertise, lack of resources, lack of content, distractions...)? Given that you wanted to \_\_\_ [objective noted earlier, probably "improve lead management"], how are you planning to \_\_\_ (meet that objective...e.g. improve lead management)?

To overcome these concerns (lack of expertise, resources, content, discipline...), what if... ;

No

[If no, has not looked into marketing automation]: How has your organization internalized the principle: "customer buying starts on the web and goes deep into the buying process before vendor reps are contacted."



How knowledgeable is Marketing about the buying processes of your various target segments?



Before a lead is passed to Sales, how does Marketing determine which stage of the buying cycle a lead is in?



Do you have a formal definition for a potential buyer at each stage of the buying cycle? How has your organization defined and documented objective measures of what a lead is? (we have not defined, Marketing defined and documented, Sales defined and documented, Marketing and Sales collaborated to define and document)



How do you record the lead's progression from stage to stage in your database?



How do you capture lead information now—for example registrations (website, events...), tele group calls out to gather info --"contact discovery", ...

